

PO Line Adjustments from SCM/Procurement Contract

PO was created from an executed SCM with multiple lines. Agency needs to move PO line amounts from one line to another. Below is the process to follow in order to accomplish this task.

Scenario = Increase Line 2 \$120.00; Decrease Line 3 <\$136.00>; Increase Line 4 \$216.00; Decrease Line 5 <\$120.00>; Decrease Line 6 <\$80.00>

1. If any PO line is reduced to 0.00 (i.e. Line 5); you must first "cancel" the PO line (do **NOT** Close) to restore those funds to the contract; **(don't make it a 0.00 amount on the PO line)**; then
2. If PO lines are to be decreased, Adjust each PO line (Merchandise Amount) that is to be REDUCED; SAVE (no need to budget check yet)
3. Go to contract: Release Amounts tab – **Maximum Line Amount** column – now update each contract line with the revised amounts.

Lines							Personalize Find
Details	Order By Amount	Item Information	Default Schedule	Release Amounts	Release Quantities	Line Groupings	Spend
Line	Item	Description	Minimum Line Amount	Maximum Line Amount	Total Line Released Amount		
1		BA PERSONNEL		12,225.000	12,225.000		
2		BA OTHER		360.000	360.000		
3		BA TRAVEL		4,406.000	4,406.000		
4		BA SUPPLIES		746.000	746.000		
5		BA CONTRACTS		120.000	120.000		
6		BA EQUIPMENT		1,000.000	1,000.000		
7		EB CONTRACTS		20,923.000	20,923.000		

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a. This is what the new lines look once the Max Line Amount is updated accordingly:

Lines								Personalize Find View All 4
Details	Order By Amount	Item Information	Default Schedule	Release Amounts	Release Quantities	Line Groupings	Spend Threshold	
Line	Item	Description	Minimum Line Amount	Maximum Line Amount	Total Line Released Amount	Remaining Amount	Curr	
1		BA PERSONNEL		12,225.000	12,225.000	\$0.000	USD	
2		BA OTHER		480.000	360.000	\$120.000	USD	
3		BA TRAVEL		4,270.000	4,270.000	\$0.000	USD	
4		BA SUPPLIES		962.000	746.000	\$216.000	USD	
5		BA CONTRACTS					USD	
6		BA EQUIPMENT		920.000	920.000	\$0.000	USD	
7		EB CONTRACTS		20,923.000	20,923.000	\$0.000	USD	

4. SAVE
5. Return to PO and adjust the lines that are to be INCREASED
6. SAVE